



# Automate Business Processes with Workflow Automation

Build a Competitive Advantage with Action Plans and Workflow Automation, powered by KnowledgeSync

## Key Benefits

- Identify tasks which require immediate attention
- Ensure critical processes are never left unattended
- Act more quickly to respond to requests or correct an errant process
- Provide everyone with the up-to-date information necessary to do their job successfully
- Save money by automating time consuming manual processes and improving productivity
- Discover further opportunities for customer interaction

You can gain a competitive advantage by defining and automating your critical business processes, while the competition struggles to develop manual sales forecasts or to identify new leads.

The dynamic combination of Action Plans and Workflow Automation, powered by KnowledgeSync, makes building great customer experiences possible by streamlining processes and reducing work for your busy workforce. Action Plans streamline the assignment of tasks to people based on milestone events. Flexible and easy to configure, you can create any number of action plans to support business processes, whether for simple sales processes, marketing projects or customer service actions. To automate tasks (such as assigning web leads or notifying staff of service escalations), or to monitor processes - Workflow Automation has the engine to accomplish many tasks and ensure the right people in your organisation take action when necessary.

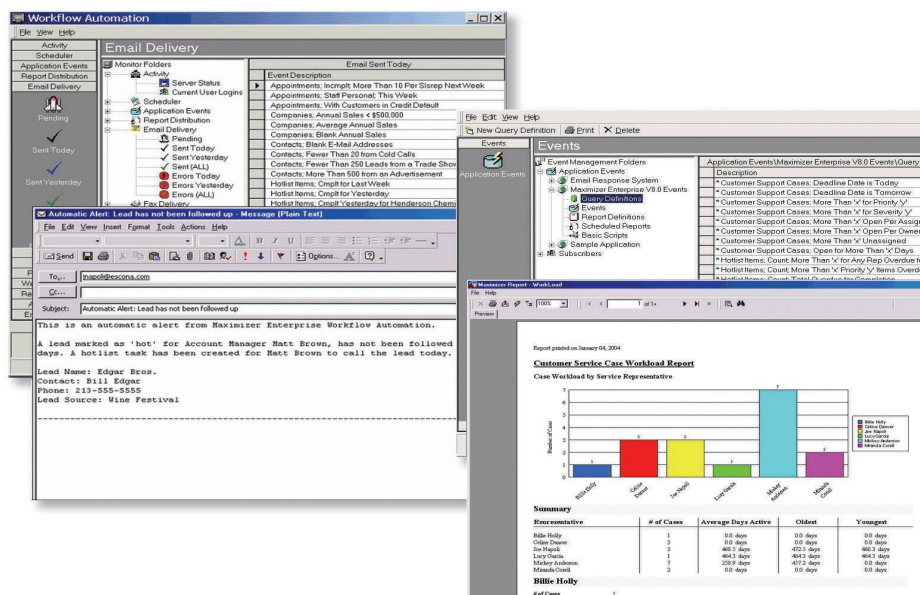
## Keep Tabs on Business and Respond Quickly

- Gain information about your critical business processes and receive alerts by email, fax, pager, PDA or phone so you can respond to time-sensitive information wherever you are.
- Monitor processes and information in Maximizer Enterprise and in other applications such as accounting or inventory systems for greater visibility and staff accountability for important daily activities. Examples:
  - ✓ If a hot lead has not been contacted within a set number of days, automatically send an alert to the sales manager and schedule a follow-up call with the appropriate account manager.
  - ✓ Alert the sales manager when a hot lead has been created without a corresponding opportunity.
  - ✓ Notify the sales manager when a sales person loses more than a specific number of deals in a given time frame, or has deals that are more than two weeks overdue for closing.
  - ✓ Set the system to alert the sales manager when an opportunity has been abandoned, lost or suspended with no reason so you can obtain the reason for accurate win/loss analysis.
  - ✓ Monitor web leads, import them into Maximizer Enterprise and place them into a one-on-one follow-up email campaign and alert the appropriate account manager.
  - ✓ When more than four customer service cases are entered for one customer in a given week, send an alert to the customer support manager and the appropriate account manager.
  - ✓ Keep sales and support professionals aware of the fact that a new customer support case has been created.
  - ✓ Send an email alert to a business partner or reseller when their client calls for customer support.
  - ✓ Receive exception reports. For example, receive alerts when employees enter inconsistent data such as missing contact information, or provide unauthorised discounts on products.
  - ✓ Check for new or updated marketing collateral and distribute alerts to business partners, resellers and employees.
  - ✓ Send reminders to remote sales reps who haven't synchronised with the main system for three days.



*“Using Workflow Automation to automate processes has saved us over 25 staff hours per week in manual tasks; moreover, being able to monitor processes has enabled staff and managers to more effectively communicate customer needs to our product development groups. We are continuing to identify processes for Workflow Automation to manage for us to further decrease manual tasks and route our customers’ valuable feedback throughout our company.”*

*- Chris Beasley, Systems Engineer, LifeWay Christian Resources*



## Develop Business Insight on a Regular Schedule or Just-in-Time

- Schedule regular Crystal Reports® to be generated and distributed automatically. For example, schedule to generate and distribute sales forecast reports to senior executives every Monday at 9:00 a.m.
- Generate and distribute reports when a certain action within Maximizer Enterprise or other application occurs. For example, if an account manager abandons or loses more than five opportunities in one week, send a sales territory forecast and phone log activity report to the sales manager.
- Save time generating reports by enabling a Crystal Report auto-fulfillment request system, which enables the system to generate and return business reports via email when an employee has submitted a request.

## Improve Customer & Prospect Communications Dramatically

- Respond quickly and create greater customer satisfaction by monitoring incoming emails to generic email addresses, for example sales@, customerservice@ and others to ensure that no enquiry goes unanswered.
- With the Email Response System, simply apply rules based on message content or sender and take action to respond immediately. Monitor incoming email messages, identify the customer’s record in Maximizer Enterprise, route the email to the appropriate account manager and append it to the customer’s record. Even create a customer service case based on message content to save time and reduce data entry errors.
- Remove names automatically from your email campaign lists when a prospect or customer has indicated they wish to opt-out or unsubscribe to comply with e-communication legislation.
- Automatically schedule tasks, phone calls or appointments in Maximizer Enterprise based on details of an incoming email message.
- Send an automatic response to the sender based on the message content so they know that you’re actively investigating their enquiry. For example, automatically create a customer service case when an email is received and send receipt confirmation with case number back to the sender.

## Actionable Intelligence Gives Unprecedented Accountability

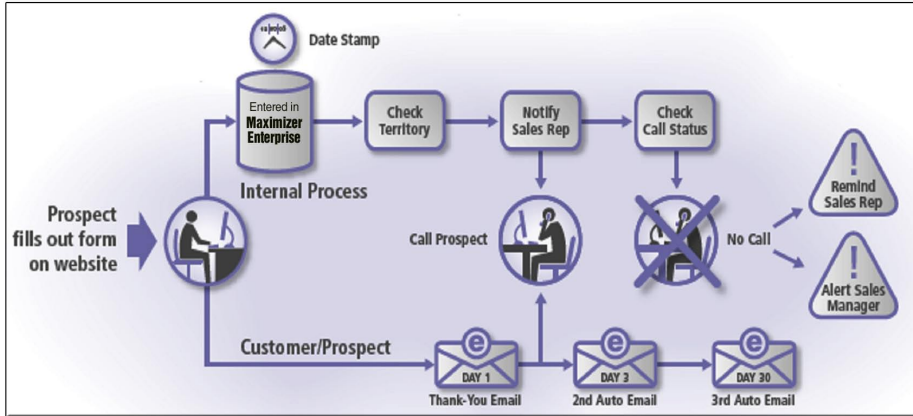
The power of Workflow Automation is demonstrated in the lead management process example below: tasks that were previously manually handled are automated, and monitoring the process ensures that no step is missed, ensuring staff is accountable for taking action.

In this example:

- A web visitor completes a form on your website to get further information from you. The contact details and any other information gathered is entered into Maximizer Enterprise and stamped with the day’s date.

- Workflow Automation can check the territory and assign it to the appropriate sales person and notify him/her with a Hotlist Task, so they can place a follow-up call.
- At the same time, based on the information the web visitor provided on the web form, he/she is placed into a one-on-one follow-up campaign. For example, if they are in Industry A, or are interested in Product B, they would receive personalised messages specific to their situation.
- If after your defined timeframe, the sales rep has not followed up, an email alert can be sent back to that sales rep as well as the sales manager, to ensure that lead is followed and qualified immediately.

Workflow Automation applied to this process saves time, lets you respond to prospects faster than your competition, enables personalised follow-up and ensures no lead slips through the cracks. This can be applied to other unique processes in your business to help you gain a competitive advantage.



**Actionable Intelligence:** Automation and alerts applied to a lead management process enables unprecedented accountability.

## Monitor Business Systems to Ensure 100% Uptime

- Configure Workflow Automation to monitor critical business applications 24 hours a day, 7 days a week to ensure systems are up and running.

Examples:

- ✓ If, for example a marketing email campaign is stopped halfway through the list, be alerted so you can restart the process where it left off.
- ✓ If a system goes down, alert your network administrator's pager.
- ✓ Maintain a high level of network security by checking log file contents for priority messages and alert the appropriate IT staff to take immediate action.
- ✓ Monitor disk space, network availability, any part of your system that is quantifiable and critical— deal with issues before they create problems.

## Workflow Automaton Suite Comparison

Monitoring	Corporate	Basic	Lite
# of Active Events	Unlimited Maximizer Enterprise + Email Response System	Unlimited Maximizer Enterprise	6 Maximizer Enterprise
Complex Queries <sup>1</sup>	✓	✓	✓
<b>Response</b>			
Crystal Reports (email or save to disk)	✓	✓	
Email Text Alerts	✓	✓	✓
Email (.html) Alerts	✓	✓	
Pager notifications	✓	✓	
Faxes (includes Fax Driver)	✓	✓	
FTP (copy files to an FTP server)	✓	✓	
Run other programs (integrate with back office applications)	✓	✓	✓
ODBC Triggers (integrate with back office applications)	✓	✓	✓
VBScript (Advanced integration with back office)	✓	✓	

<sup>1</sup> The ability to configure an event to use multiple queries, the ability to make one event dependent on one or more other events, the ability to have one event "call" one or more other events, or the ability to trigger an event based on a change made to a database field



## For More Information

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## What Makes Maximizer Enterprise Better?

- One fully integrated product that's easy to use
- Superior flexibility, easy to configure & customise
- Rapid implementation, simple to administer
- On demand access: Desktop, PDA & Web-Ready
- Integrates with Microsoft® Office and Outlook®, plus leading accounting programs
- Bullet-proof security
- Architecture built on industry standards
- Low total cost of ownership

### Maximizer Enterprise 9

Designed for small and medium-sized businesses, Maximizer Enterprise 9 rapidly helps companies gain strategic insights and implement winning strategies that will outperform competitors. This proven, affordable CRM solution gives sales, marketing and service professionals the tools they need to attract prospects, win new customers and increase repeat business.

### About Maximizer Software

Maximizer Software has helped over 7,000 Maximizer Enterprise customers and more than one million Maximizer users grow their businesses by building profitable customer relationships with award-winning solutions.

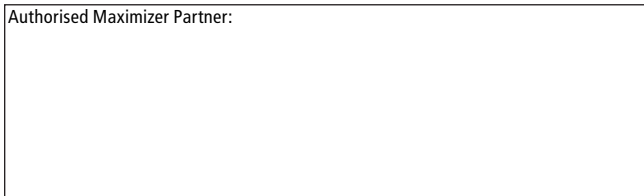
## Maximizer Enterprise works with technology from the following partners



## Awards



Authorised Maximizer Partner:



[www.max.co.uk](http://www.max.co.uk)

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